COVER SHEET FOR AMENDMENT OF POST-TRAVEL SUBMISSION

Date/RECENTED

SECRETARY OF THE SENATE
PUBLIC RECORDS

2019 SEP 16 PM 3: 18

Instructions: Use this form as a cover sheet for any paperwork you may need to submit to the Office of Public Records in order to make your Privately Sponsored Post-Travel Submission complete in accordance with Rule 35. Only complete this form if you need to submit an amendment to a post-travel filing you have already submitted.

SUBMIT DIRECTLY TO THE OFFICE OF PUBLIC RECORDS IN 232 HART BUILDING

Name of Traveler: Bryce McKibben	
Employing Office/Committee: Senate HELP Comm	nittee
Travel Expenses Paid by (List all sources): Postsecon	
Travel Date(s): April 23-25, 2019	
Description/Title of Attached Forms:	
Private Sponsor Travel Certification Form (PSTC	CF) & Attachments
Final Itinerary	
Purpose of Amendment (describe the reason for amend Including the final version of the Private Sponsor	
Including the final page of the itinerary	
	•
9/16/2019 (Date)	By More (Signature of Traveler)

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should NOT submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee MUST also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

l.	Sponsor(s) of the trip (please list all sponsors): Postsecondary National Policy Institute (PNPI)
2.	Description of the trip: This trip is designed to increase staff's knowledge of the role loan servicers play in the federal Direct Loan system.
3.	Dates of travel: April 23-25, 2019 (two nights overnight)
4.	Place of travel: St. Louis, MO and Chesterfield, MO
5.	Name and title of Senate invitees: See attached.
7.	I certify that the trip fits one of the following categories: (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip. OR − (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (see question 9). I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal. AND −
	I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8.	 I certify that: The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for de minimis lobbyist involvement. AND -
	The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (see question 9).

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9.	USE ONLY IF YOU CHECKED QUESTION 6(B) I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:
	 (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip. OR –
	 □ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip (see questions 6 and 10). - OR -
	(C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.
10.	USE ONLY IF YOU CHECKED QUESTION 9(B) If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:
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ł 1.	An itinerary for the trip is attached to this form. I certify that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.
12.	Briefly describe the role of each sponsor in organizing and conducting the trip:
	PNPI is the sole sponsor, planner and executor of the trip. PNPI created the agenda, developed the
	invitation.list.and.is.managing.event-panels-and-logistics.
13.	Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission: PNPI provides professional development to current and prospective policymakers who work on higher
	education issues. This event is designed to increase congressional staff's knowledge of federal
	student loan servicing.
14.	Briefly describe each sponsor's prior history of sponsoring congressional trips: Since 2012, PNPI has sponsored twenty congressional staff seminars on postsecondary topics including
	federal student aid, higher education accreditation, student data, and competency-based education.

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	In addition to multi-d	day seminars, PNPI spon	sors Hill-based briefi	ngs for larger Hill aud	diences and is
	available to all congr	ressional staff for postsed	condary related resear	arch support. PNPI a	lso offers
	professional develop	pment, briefings, and boo	t camps to prospecti	ve policymakers.	
16.	Total Expenses for E	Each Participant:			
		Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expens
	Good Faith estimate Actual	\$359.90 (round trip flight cost and on the ground shuttle to meetings)	\$266 (two nights)	\$89	\$0
	Amounts				
17.	State whether a) the trip involves an event that is arranged or organized without regard to congressional participation or b) the trip involves an event that is arranged or organized specifically with regard to congressional participation: The trip is arranged and organized specifically with regard to congressional participation.				
	participation or b) the congressional particip	e trip involves an event the pation:	nat is arranged or org	anized <i>specifically</i> w	vith regard to
18.	participation or b) the congressional participation. The trip is arranged a	e trip involves an event the pation:	with regard to cong	anized <i>specifically</i> w	vith regard to
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	Participation or b) the congressional participation. The trip is arranged at the Missouri Higher just outside of St. Lou Name and location of Hyatt Regency St. Lou	e trip involves an event the pation: and organized specifically the location of the event of Education Loan Authority ais, MO. Thotel or other lodging fa	with regard to cong (MOHELA) is a Direction.	ressional participation	n.
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21.	Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:
	Lodging costs \$133/night, the federal per diem. Meal costs are \$5 on day one
	(snacks), \$63 on day two (breakfast, lunch, dinner, snacks) and \$38 on day three (breakfast, lunch,
	snacks). All rates are at the federal per diem.
22.	Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:
	All air travel will be coach class.
· 23.	I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).
24.	List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:
	None
	+
25.	I hereby certify that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you must include a completed signature page for each additional sponsor):
	Signature of Travel Sponsor: May 1
	Name and Title: MaryEllen McGuire, President
·	Name of Organization: Postsecondary National Policy Institute (PNPI)
	Address: 718 7th Street NW, Floor 2, Washington, DC 20001
	Telephone Number:
	Fax Number:
	E-mail Address: mcguire@pnpi.org

ATTACHMENT: Senate Private Sponsor Travel Certification Form

5. Name and title of Senate invitees:

Katie Brown

Chief Counsel

Senator Collins

Tim Carlton

Policy Advisor Senator Cassidy

Kara Marchione

Director of Education Policy

Senator Murray

Karen McCarthy

Senior Legislative Assistant

Senator Murkowski

Bryce McKibben

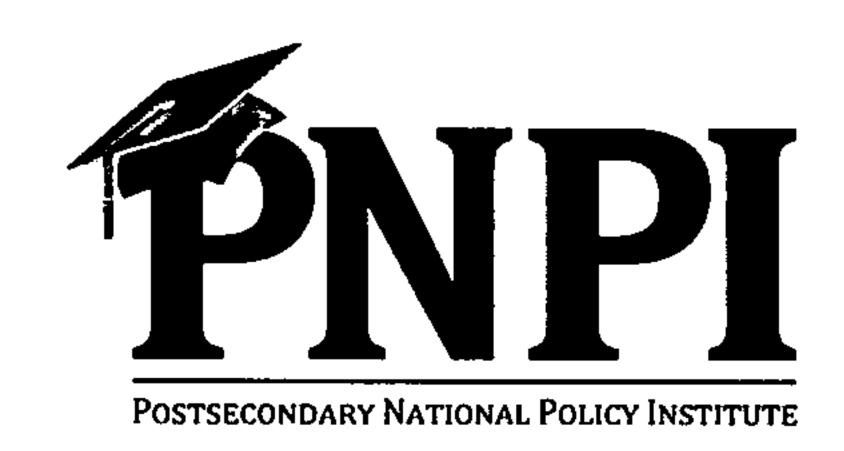
Senior Policy Advisor

Senator Murray

Emily Smith

Legislative Assistant Senator Murphy

All staff were invited due to their employment with the Senate HELP Committee or with a Member who sits on the Senate HELP committee.



FEDERAL STUDENT LOAN SERVICING SEMINAR

St. Louis, Missouri April 23-25, 2019

Seminar Goals

- Deepen staff understanding of the challenges borrowers face when navigating student loan repayment.
- Increase staff understanding of the role loan servicers play in the federal Direct Loan system.
- Increase staff understanding of the complexities and challenges servicers face working within the current system.
- Expand staff understanding of the current servicer compensation model and performance metrics.
- Tour a student loan servicing and fulfillment center to better understand and view the processing and life of a student loan in repayment.
- Consider how the current student loan servicing system can be improved.

Tuesday, April 23

5:40 PM	Staff arrive at Ronald Reagan Washington National Airport (DCA), one hour prior to departure.
6:40 PM	Depart DCA for St. Louis, Missouri (STL), SW Flight #1008
7:55 PM	Arrive STL & Travel to Hotel
8:30 PM	Arrive & Check-in: Hyatt Regency St. Louis at the Arch, 315 Chestnut St. St. Louis. MO 63102

Wednesday, April 24

7:15-8:15 AM Breakfast & Morning Briefing, Hyatt Regency St. Louis at the Arch Facilitator: MaryEllen McGuire, Postsecondary National Policy Institute

Staff will meet for breakfast and review the day's agenda and programming goals.

8:15-9:00 AM Travel to Missouri Higher Education Loan Authority (MOHELA)

Student Loan Servicing Center

Location: 633 Spirit Drive, Chesterfield, MO 63005

9:00-9:15 AM Introduction to MOHELA

Presenters: Raymond H. Bayer, Jr., Executive Director and CEO & Jennifer Farmer,

Director, Federal Contracting

MOHELA will provide an overview of their business model during this session.

9:15-10:15 AM Borrower Calls & Service

Presenters: Laura Catlett, Director, Borrower Contact Center & Raymond H. Bayer, Jr., Executive Director and CEO

During this session, participants will listen to, ask questions about, and comment on service provided on "recently live" incoming borrower calls. *All personally identifiable information will be removed from the calls prior to the start of the session.

10:15-10:30 AM Q&A with Contact Center Agents

Moderator: Raymond H. Bayer, Jr. Executive Director and CEO

Participants will participate in a facilitated Q&A session with contact center agents.

10:30-10:45 AM Blending High-Tech, Low-Tech and High Touch Ways to Assist At-Risk Borrowers

Presenters: Raymond H. Bayer, Jr., Executive Director and CEO & Ginny Burns, Director, Customer Advocacy Team

This session will cover high-tech, low-tech, and high touch ways to assist at-risk borrowers.

10:45-10:55 AM Break

10:55-11:30 AM Facility Tour

Staff will be given a tour of the loan servicing and fulfillment center with time spent observing the process, volume, and results of MOHELA's IDR application pre-fill process.

11:30 AM-12:00 PM Performance Metrics & MOHELA's Metri

Presenter: James Matchefts, MOHELA General Counsel Staff will study MOHELA's proprietary "heat map" that visually delavailable metric results for each of the 17 different servicer metric Pros and cons of the current metrics and possible enhancements to weight will be discussed.

12:00-12:45 PM Working Lunch

Presenters: Raymond H. Bayer, Jr., Executive Director and CEO, Jennifer Farmer, Director, Federal Contracting, James Matchefts, MOHELA General Counsel, Carol Malon, Chief Financial Officer, Paul Mosquera, Chief Compliance and Risk Officer, Ginny Burns, Director, Customer Advocacy Team & Laura Catlett, Director, Contact Center

Location: MOHELA Headquarters Conference Room

Over lunch, participants will take part in a Q&A focused on servicer challenges and how these challenges impact student borrowers and the service they receive.

12:45-1:30 PM Servicer Compensation Model

Presenters: Danny Marshall, MOHELA Federal Contracting Manager & Frank Reyes, MOHELA Controller

Participants will review MOHELA's Direct Loan invoice and detailed income/expense statements for January 2019 to better understand the current servicer compensation models. The group will then discuss the pros and cons of the current servicer compensation model and consider recommendations for improvement.

1:30-2:00 PM Agent Training, Development & Quality Assurance

Presenters: Christy Baze, MOHELA Manager of Training, Development and E-Learning & Arthur Meyers, Quality Assurance Supervisor

This session will review the process of hiring, training and monitoring call center agents.

2:00-2:30 PM Escalated Call Handling, the Customer Advocacy Team & the Military VIP Team.

Presenter: Ginny Burns, Director of Customer Advocacy This session will focus on complaint escalation and tracking.

2:30-3:15 PM Federal Student Aid's (FSA) Current Student Loan Portfolio

Presenter: Raymond H. Bayer, Jr., Executive Director and CEO

This session will review and discuss the current makeup of FSA's loan portfolio, including delinquency rates, repayment plan utilization, forbearance types, and utilization.

3:15-3:30 PM Break

3:30-4:15 PM Fraud

Presenter: Scott Lause, Assistant General Counsel

Staff will learn about fraud against borrowers – tactics used (e.g. Doc prep companies) and the costs associated with it.

4:15-5:00 PM Closing Discussion

Moderator: Raymond H. Bayer, Jr., Executive Director & CEO

Additional Presenters: James Matchefts, MOHELA General Counsel, Carol Malon, Chief Financial Officer, Paul Mosquera, Chief Compliance and Risk Officer, Ginny Burns, Director, Customer Advocacy Team, Laura Catlett, Director, Contact Center & Jennifer Farmer,

Director, Federal Contracting

The visit will conclude with a discussion focused on the state of the student loan servicing industry, including the hardships, consequences, and costs of borrower default.

5:00 PM Depart for Hyatt Regency St. Louis at the Arch

5:45 PM Return to Hyatt Regency St. Louis at the Arch

6:00-7:30 PM Dinner at Lombardo's Trattoria,

Location: 201 South 20th Street, St. Louis, MO 63103

Thursday, April 25

8:00-8:45 AM Check-Out & Breakfast, Hyatt Regency St. Louis at the Arch

8:45-10:15 AM Roundtable with Loan Servicers

Participants: Raymond H. Bayer, MOHELA, Jim Farha, Oklahoma Student Loan Authority (OSLA), Aisha Smith, NELNET & Patricia Christel, Navient

Staff will participate in a roundtable discussion with several servicers to better understand what they have in common, how they differ, and how they each view their role and challenges within the current system. Participants will also consider ways in which the current system could be changed to improve the borrower experience and decrease borrower defaults.

3:15PM	Arrive DCA
12:25 PM	Depart St. Louis, Missouri (STL) for Ronald Reagan Washington National Airport (DCA), SW Airlines Flight #2236
11:00 AM	Arrive at Airport and Check-in for Flight
10:20 AM	Depart Hotel for Airport